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Recreational Fishing
A Service Industry Profile

Economic and Commercial Analysis
Report No. 35

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Canada

Recreational Fishing
A Service Industry Profile

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SUMMARY

The recreational fishing economy in Canada consists of two distinct branches. The "specialized" branch is essentially the outfitting industry. The "general" branch comprises a wide assortment of businesses including department and hardware stores, motels, restaurants, marinas, transportation services and grocery outlets.

The "specialized" branch consists primarily of owners and operators of lodges, resorts, camps, chalets and charter boats as well as independent tackle shops. These businesses are closest to the actual fishing activity and are, as a consequence, highly dependent upon anglers for sales and income.

In contrast, the "general" service businesses cater to a broad clientele of which anglers usually represent a small fraction. While the collective spending of anglers is important to the "general" service branch, no one establishment in this category would be heavily dependent on sales to anglers. Moreover, the location of "general" service establishments reflects population concentrations whereas outfitting businesses tend to locate in more remote areas from which good fishing sites are easily accessible.

The value of sales made solely for the purpose of recreational fishing approached $2.5 billion in 1985. This volume of business can be considered as representing the annually recurring purchases. It excludes periodic spending on big-ticket purchases such as boats, motors and real property which approached $2 billion in 1985.

There are about 2400 outfitting operators in Canada who offer recreational fishing opportunities. About 2000 of these, or more than 80 per cent, offer hunting as well as fishing. The outfitting industry accounted for more than $400 million in sales in 1985 or about 15 per cent of all purchases made solely for recreational fishing. Fishing packages, put together by outfitters, amounted to nearly $270 million or about 65 per cent of all outfitting revenue. About 50 per cent of package sales were made to foreign anglers who were almost entirely American.

Statistics Canada reported the average revenue of outfitters (including hunting revenue) at about $97,000 in 1984. Small operators (annual revenues less than $100,000) outnumber large by two to one. Ontario outfitters and British Columbia saltwater lodges show the strongest financial performance. With the exception of the West Coast saltwater operators and most Ontario lodges, much of the outfitting industry in Canada experiences low profits.

The large "general" branch of the recreational fishing economy includes motels, airlines and flying services, restaurants, marinas, sports stores, department and hardware stores and grocery outlets. It supplied goods and services valued at about $2 billion or about 85 per cent of all purchases made solely for recreational fishing in 1985. Unlike outfitters, many businesses in the "general" service category tend to be concentrated in stable, economically diverse regions of Canada and do not rely to the same extent on anglers for sales and income.

Demand for recreational fishing and associated services is stable nationally. Ontario, where almost half the angling in Canada occurs, reports growth in demand for fishing services in recent years. Fishing effort in Canada, measured by the number of days in which some fishing is undertaken, was stable over the three Surveys of Sport Fishing in Canada organised by the Department of Fisheries and Oceans in 1975, 1980 and 1985.

1. INTRODUCTION

Recreational fishing is the most popular outdoor activity in Canada, and Canada is renowned for the excellence of its fishing opportunities. About five and a half million Canadians and almost a million visitors to Canada engage in recreational fishing each year.

Anglers generate substantial commercial activity in all regions of Canada. Many outfitting businesses are heavily dependent upon sales to anglers. In 1985, anglers spent almost $4.5 billion to acquire goods and services solely for recreational fishing purposes. In many communities, outfitting operations provide important seasonal employment and income.

Angler groups and outfitting operators are becoming organised in many parts of Canada. Efforts are being made to promote conservation and orderly development of the recreational fishing industry. There are strong indications that recreational fishing activity will require more attention from governments in terms of policy and management initiatives than has been the case in the past.

In this context, the purpose of this study is to provide an understanding of the operational and economic characteristics of the commercial services which support recreational fishing.

The Department of Fisheries and Oceans has historically been concerned with the management of fish stocks and the maintenance of the habitat. The concerns of the recreational fishing service industry have not been as well recognized. There is a need to seek a better understanding of the economic character of the service industry which, like the resources and the habitat, is a vital component of the fishery. An economic profile will help develop an appreciation for the contribution provided by the service industry to the recreational fishery.

The service industry supporting recreational fishing activity in Canada consists of a large number of businesses. "Specialized" outfitting businesses comprise lodges and resorts, camps, chalets and charter boat operators as well as independent tackle shops. These businesses are closest to the fishing end of the service spectrum and are, in consequence, the most dependent upon fishing for sales and income. "General" businesses, such as motels and hotels, marinas, sports stores, hardware stores, grocery outlets and department stores, cater to a broader clientele and are usually large and diversified. For this "general" group, anglers represent a smaller percentage of total sales. Taken together, however, anglers constitute an important clientele for the "general" suppliers.

Suppliers to recreational fishing are dependent to varying degrees upon the existence and continuation of angling activity. The more specialized outfitters are highly dependent upon anglers and fishing. The dependence works both ways. Anglers who prefer organized fishing experiences rely on the facilities and expertise of outfitters. The vast majority of anglers prefer an independent approach to fishing by arranging their own access to the resource. Some anglers, of course, undertake both arrangements for fishing.

This basic division of the activity along the lines of fishing arrangement and the degree of dependence upon angling for sales and income determines the framework for this study. Because of its high degree of dependence on angling, outfitting services are central to the study purpose. Nevertheless, the intent is to portray the entire recreational fishing economy in terms of the scope of business, the operational characteristics and the value of products and services.

Section 2 deals briefly with the range of recreational fishing conducted across Canada and the geographic pattern of fishing effort and catch. As well, this section provides information on underlying trends in yields and angler spending per unit of catch. An introduction to the service industry which supports recreational fishing is provided.

Section 3 focuses on outfitting operations in Canada. The outfitting industry is defined and the activity characterized in terms of its general features, number of operations and regional distribution. The financial performance and business conditions facing outfitters as a group and on a regional basis are examined. Some institutional aspects which influence the business environment for fishing lodge operators are discussed.

Section 4 places the support services for recreational fishing in an economic context. The organizational pattern and economic structure of the service industries which conduct business with anglers is described. The two major components of the recreational fishing economy are treated separately. This section is supported by a set of tables which present the pattern of purchases which anglers made solely for the purpose of fishing in 1985.

2. DIMENSIONS OF THE RECREATIONAL FISHERY

2.1 Range of fishing activity

Recreational fishing takes place in both freshwater and saltwater environments in Canada. With over 750,000 square kilometers of freshwater and 240,000 kilometers of coastline on three oceans, Canada offers a stupendous recreational resource to its residents and foreign visitors. Both salt and freshwater recreational fishing are important in their own right. However, 95 per cent of recreational fishing occurs in freshwater, which is easily accessible from Canada's major population centres.

Canada is renowned for the excellence and diversity of angling opportunities. Surveys conducted by the Department of Fisheries and Oceans, in collaboration with the provincial and territorial governments, reveal that anglers' interests encompass over 75 species. In terms of volume of catch the principal species are northern pike, walleye (pickerel), six species of trout and four species of bass.
On a regional basis a number of other fisheries assume high profiles. In Eastern Canada, Atlantic salmon occupy a prominent place and for many - including hundreds of foreign anglers - offer the ultimate angling experience. Various saltwater species such as cod, mackerel and striped bass are also significant in Newfoundland, the Maritime Provinces and Québec.

Trout, walleye, northern pike and perch are the favourites of anglers in Québec.

Ontario offers the widest range of species in Canada. Apart from large volumes of perch, smelt, walleye, bass and pike a small group of anglers are attracted to muskellunge.

In the Prairie Provinces, pike and walleye receive the most attention. Trout and whitefish are significant catches in Alberta. Arctic greyling are sought in the northern regions of the Prairies.

In British Columbia, salmonids are the principal catch of the recreational fishery in both saltwater and freshwater. Chinook, coho and pink salmon are the most popular with saltwater anglers in British Columbia. Trout, including Dolly Varden, salmon and Kokanee are popular in freshwater while steelhead trout attracts a limited following.

In the Northwest Territories, walleye and Arctic charr as well as lake trout offer good angling. Arctic greyling are also a significant species in the Northwest Territories.

In the Yukon, lake trout, pike and Arctic greyling comprise the principal catches.

2.2 Distribution of effort and catch

The activity characteristics of recreational fishing in Canada for 1985 are displayed, by jurisdiction, in Table 1. Ontario, Québec and British Columbia dominate the recreational fishing scene in terms of anglers, effort and catch.

The salient fishing characteristics of foreign visitors and Canadians who fish outside their home jurisdictions are shown in Table 2. The importance of visiting anglers to the service industries is apparent from the level of expenditures associated with this activity - almost $450 million in 1985.

2.3 Effort and yield

This section examines what has happened generally over the 1975 to 1985 period in terms of fishing effort and resource yield. From the perspective of the service industry - both the outfitters and general suppliers - effort and yield trends are reasonable indicators of the underlying conditions in recreational fishing activity upon which the service businesses depend to varying degrees.

Table 3 shows trends in activity and yield parameters for three data points: 1975, 1980 and 1985. On a nation-wide basis the angling participation rate, defined as the number of active resident anglers expressed as a percentage of population, has remained constant at about 21 per cent for 1975 and 1985. Over the same time, foreign anglers visiting Canada increased significantly (916,094 in 1985 versus 840,941 in 1975). Total non-resident and resident fishing effort remained fairly constant in the three years 1975, 1980 and 1985. This works out in terms of average angler-days per active adult angler to be 16.2 angler-days in 1975, 15.1 in 1980 and 15.0 in 1985. Again, the trend in catch (number of fish retained) per angler-day gives no indication of a decline over this period at 2.6 fish per angler-day in 1975, 2.1 in 1980 and 3.1 in 1985.

In terms of cost per unit catch, cost per fish retained, after correcting for inflation, shows a moderate increase over the years, 1975, 1980 and 1985. In terms of 1989 price levels, the cost expended by anglers per fish retained was $10.30 in 1975, $11.60 in 1980 and $12.15 in 1985. This should not be interpreted as implying any underlying trend in the state of fish stocks. The low number of data points calls for caution in developing trends over time. There is also the complication that recreational activity is a consumption activity and anglers may be engaging in self-indulgent purchases of higher priced (not necessarily more productive) gear or more luxurious accommodations.

2.4 Service Industry

Thousands of business are involved in the provision of the multiplicity of goods and services required by anglers of all sorts - week-end cottagers, family vacationers, fly-in lodge guests, derby

TABLE 1: ACTIVITY CHARACTERISTICS BY PROVINCE/TERRITORY, 1985

	Active Anglers (All Ages)		Catch (consumed)		Effort (angler-days)	Angling-Specific Expenditures[3] $
	Residents	Non-Residents[1]	No.	kg		
Newfoundland	159,510	4,411	12,378,741	4,844,500	2,372,912	36,238,890
Prince Edward Island	15,095	2,525	753,645	181,331	289,718	2,031,516
Nova Scotia	99,554[2]	2,624	4,593,010	1,033,820	1,215,934	15,198,964
New Brunswick	156,873	9,226	4,955,831	1,079,411	1,466,790	24,787,533
Québec	1,204,593	69,143	102,396,606	N/A	22,720,341	587,288,851
Ontario	2,328,192	732,403	74,391,427	40,125,753	34,426,728	981,241,059
Manitoba	191,979	48,219	4,295,201	4,390,231	2,684,006	85,426,568
Saskatchewan	195,886	53,013	4,767,959	1,917,370	1,946,043	70,705,313
Alberta	417,435	13,318	11,214,369	6,981,490	5,372,248	132,490,200
Northwest Territories	10,995	8,276	188,557	147,744	172,692	15,574,537
Yukon	7,431	8,522	108,712	139,414	123,303	5,652,936
B.C. saltwater	280,835	101,832	4,149,987	7,874,761	3,280,621	237,552,351
B.C. freshwater	331,775	86,901	5,815,414	3,576,402	4,753,976	144,076,505
TOTAL CANADA	5,400,153	1,140,413	230,309,459	72,292,227	80,825,312	2,337,655,223

([1]) Visiting anglers from other Canadian jurisdictions and those from outside Canada.

([2]) Does not include children in households which had no adults with fishing licences.

([3]) Spending by anglers solely for the purpose of recreational fishing.

SOURCE: 1) Department of Fisheries and Oceans, 1985 Survey of Sport Fishing in Canada.
2) Provincial and Territorial Sport Fishing Surveys, 1985.

TABLE 2: 1985 NON-RESIDENT ANGLERS - SALIENT CHARACTERISTICS

	Canadians fishing in other Provinces/territories	Foreign anglers fishing in Canada
Adults: male	149,086	638,180
female	27,925	137,540
total	177,011	775,720
Anglers under 16 years([1])	47,308	140,374
Fishing Effort (days when fishing)		
Freshwater	1,363,686	5,989,640
Saltwater	93,022	348,828
Average days fished	8.2	8.2
Direct fishing expenditures	$84.585,429	$445,840,793

([1]) Includes others not required to buy licences.

SOURCE: Department of Fisheries and Oceans, Sport Fishing in Canada, 1985.

TABLE 3: RECREATIONAL FISHING CHARACTERISTICS 1975, 1980 and 1985

	1975	1980	1985
Total active anglers(1)	6,443,200	4,208,656	6,540,566
Angler-days(2) fishing	72,539,600	74,101,000	73,986,465
Fish retained	189,883,500	153,622,500	230,009,447
Angling-specific(3) expenses	$799,886,800	$1,111,008,000	$2,487,250,912

NOTE: Includes freshwater and saltwater recreational fishing by residents and non-residents. Estimates require caution in interpretation because of definitional and certain methodological differences among jurisdictions covered by the survey.

(1) Includes those under 16 years of age and those anglers not requiring a licence.
(2) Days on which some time was spent fishing.
(3) Spending by anglers solely for recreational fishing.

SOURCE: Department of Fisheries and Oceans, Sport Fishing in Canada, 1975, 1980, and 1985.

participants, saltwater anglers and the hundreds of thousands of anglers who go ice fishing or slip out to their favourite stream as often as possible. The vast majority of anglers choose to organize their fishing outings independently - without the services of guides and outfitters. Consequently, the bulk of anglers' needs are supplied by the full range of merchandise and service outlets which cater to the general public. A smaller group of anglers prefer to utilize the facilities and expertise provided by outfitting businesses who specialize in services to anglers including, usually, access to the fishing sites. Obviously, the two groups are not mutually exclusive; some anglers undertake both approaches to fishing.

This basic difference in anglers' approaches to recreational fishing determines the economic organization of the supporting service industry. The basis for a division along the lines of "specialized" and "general" services lies in the degree of economic dependence on angling activity. "Specialized" services are those businesses which depend critically upon angling activity for sales and income. It will be noted that such a definition raises the question of arbitrarily drawing boundaries. For the purpose of defining the recreational fishing economy, however, it is not necessary to refine the concept further.

Businesses which depend critically on angling activity coincide closely with the outfitting industry. Outfitting businesses are principally fishing lodges and similar facilities, charter boat operations and independent tackle stores. In this profile the businesses which coincide with the outfitting industry are considered to comprise the "specialized" branch of the total recreational fishing economy.

The "general" branch encompasses all the disparate businesses which supply anglers as a part of a larger clientele. "General" branch businesses include department stores, hardware stores, sport stores, motels and hotels, restaurants, marinas, marine suppliers, and grocery outlets. The "general" branch suppliers are distinguished by the fact that these businesses serve a large general clientele and are in consequence not critically dependent upon sales to anglers. Under this definition, fishing or tackle sections found in many department, hardware and sports stores would fall in the "general" services category to the extent that sales of these items do not amount to a high proportion of total business revenue.

3. OUTFITTING SERVICES

3.1 General Features

The term "outfitting" is generally applied to encompass an assortment of operations. Outfitting, as used in this profile, coincides with the notion of the "specialized" service industry, i.e. businesses which depend upon angling activity for a very substantial proportion of total revenue. The bulk of the "specialized" business is going to fishing lodges of one sort or another. Charter boat business is big in the British Columbia saltwater sector, in the Great Lakes Region and on a lesser scale in the Atlantic provinces.

An indicator of the variety and range of facilities and services offered by the fishing lodge sector is given in Exhibit 1. Possibly no one operator would offer the full range of facilities. In fact, most operations are characterized as basic or "rustic".

Information on outfitters provided in Table 4 shows that more than 80 per cent of fishing outfitter operations offer both hunting and fishing activity. About 400 outfitting operations offer only fishing. Alternative recreational activity such as nature hikes, swimming, canoeing, cross-country skiing and snowmobiling are being offered increasingly. According to one survey in British Columbia, some type of alternative activities (not including hunting) are being offered by up to 75 per cent of freshwater fishing lodges and resorts in that Province.

Outfitting operations differ in the types of accommodation offered. These include lodges, resorts, cabins or chalets and outpost camps. Some resorts offer full-fledged hotels and motels.

Tourism Canada estimates that from 50 to 90 per cent of outfitter facilities are accessible by road depending on the region of the country. Outpost camps are accessible by fly-in services or water transport.

Some outfitter operations are located on private land. Most, however, lease public land for fishing purposes with or without rights of exclusive access to the resources. Exclusive-rights leases are most common in Québec where Zones d'exploitation contrôlée (ZECs) have emerged as important recreational fishing establishments.

Small operators providing less than 25 beds - and combining outfitting with some other source of income - dominate the industry. Small operations outnumber large operations two to one.

EXHIBIT 1: FISHING LODGE BUSINESS - RANGE OF FACILITIES & FEATURES

	SELECTION OF AMENITIES	
ACCOMMODATIONS	. Housekeeping cabins . Resorts . Lodges . Outpost camps . Campgrounds	
FACILITIES	. Restaurant/Dining Room . Lounge . Private bath . Shared bath . Laundromat . Tackle shop	. convenience store . smoke house . freezing facilities . full service hook-up . marina/boat rentals . airstrip
PRODUCT FORMS	. Lake fishing . River/stream fishing . Guide services . Ocean fishing	. Ice fishing . Fishing Instructions . Alternative Activity
ACCESSIBILITY	. Road . Air . Boat	
PRICING	. Package (basic) . Individual services	. Full-service "American Plan"

The size and type of facilities and services offered reflect the location and type of clientele demands. The most transparent division of establishments is made between (a) the usually remote fly-in operations offering basic accommodations and services for the class of angler preferring to "rough it" in nature and (b) the easily accessible drive-in resorts catering to convenience-oriented vacationers.

Larger operations tend to be located relatively close to urban centres to tap the larger market for family outings. Many of the smaller operations are rustic, often lacking the conveniences offered in larger lodges and resorts. Large operations frequently offer "full-service" facilities such as a restaurant or dining room, lounge, private bath, sauna, laundromat and other conveniences. In contrast, some small operators offer outstanding fishing opportunities to those anglers who are not so concerned with the range of services.

Generally, the operating period ranges from six weeks to five or six months. The few operations which stay open year-round are located close to urban centres. Those outfitting operations which rely solely on recreational fishing (as distinct from those which combine fishing and hunting) are open only for a short period.

3.2 Regional Profiles

Table 4 gives the number and regional distribution of outfitter establishments according to fishing only or combined fishing and hunting capabilities. About 50 per cent of operators are located in Ontario, 20 per cent in Québec and 10 per cent are located in British Columbia.

British Columbia is the only province with freshwater and saltwater (or tidal) recreational fisheries on a major scale. There were 206 freshwater operations and 51 saltwater operations in British Columbia in 1987. Trailer camps provide popular accommodations in B.C. accounting for over 70 per cent of demand in the freshwater fishery versus 26 per cent in the saltwater sector.

The range of indoor facilities is reported to be rather limited in the British Columbia freshwater outfitting operations. This, however, does not detract from the fishing experience offered. British Columbia saltwater operations typically offer facilities more attune to the up-scale end of the market.

Seventy-five per cent of saltwater facilities are on Vancouver Island and 75 per cent of freshwater sites are in High Country and the Cariboo. While freshwater facilities are widely distributed throughout the province the largest concentration occurs in the Kamloops, Cariboo

TABLE 4: NUMBER AND DISTRIBUTION OF OUTFITTING OPERATORS - 1988

PROVINCE OR TERRITORY	FISHING ONLY	FISHING AND HUNTING	TOTALS
Newfoundland	39	-	39
Prince Edward Island	-	-	-
Nova Scotia	-	18	18
New Brunswick	-	105	105
Québec	105	400	505
Ontario	-	1,120	1,120
Manitoba	-	106	106
Saskatchewan	104	76	180
Alberta	10	-	10
British Columbia Freshwater*	66	140	206
British Columbia Saltwater*	41	10	51
Yukon	-	2	2
Northwest Territories	41	-	41
Canada	406	1,977	2,383

* Estimated from sample data provided in DPA, 1989.

SOURCES:

1 Tourism Canada,"Fishing and Hunting: A Position Paper" Draft Report 1989, p.5.

2 DPA Group Inc and MacLaren Plansearch Corp., "Fishing Lodges and Resorts in British Columbia" Report prepared for the Ministry of Tourism and Provincial Secretary of British Columbia, p.3-7.

and Okanagan regions. Saltwater activity is concentrated in the Campbell River area, Tofino/Barkley Sound, Victoria, and northern Vancouver Island and the Strait of Georgia.

Alberta had ten fly-in fishing operations in 1988 ranging from basic cabin accommodations to full-service lodges. A number of outfitting operations offer fishing opportunities without accommodations. These specialize in river float trips.

There were 41 fishing operations in the Northwest Territories in 1988 of which about half are accessible by road. The Northern Frontier and Big River are mainly road accessible while more remote operations in the Keewatin, Baffin and the Eastern Arctic are accessible by float plane. The most popular fishing sites are at Great Bear Lake and Great Slave Lake in the North Frontier region.

Yukon had two outfitting operations in 1988. Both offered combined fishing and hunting opportunities.

Saskatchewan offered 104 fishing-only establishments in 1988 and 76 combined fishing and hunting. In the Northern part of the province - where about 140 establishments are located - access is limited to air and boat transportation for about half the establishments. Many operators own outpost camps. In the southern part of Saskatchewan outfitters have diversified to some degree into alternative recreational activity and general tourism services. Twenty-four establishments are open year-round.

Manitoba had 106 outfitting operations in 1988. All offered both fishing and hunting opportunities. About 75 per cent are seasonal operations extending about five months.

About 50 per cent of all outfitting operations in Canada are located in Ontario. Ontario had about 1400 outfitters located in the northern regions of which 1120 are combined fishing and hunting establishments. The Northern Ontario Tourist Outfitters (NOTO) estimate that Ontario is home to 35 to 40 per cent of all fishing lodges in the world. Resorts Ontario represents lodges and resorts in the southern regions of Ontario. These are for the most part multi-product recreational facilities.

Northern Ontario Tourist Outfitters (NOTO) reports that 75 per cent of establishments in the province are road-accessible. Ontario outfitters offer a full range of opportunities from luxury lodges to outpost camps. Fly-in operations are common. About 40 per cent of operators report at least part of their business from this type of facility. The typical lodge is small - comprising less than ten units. There are 1400 outpost camps owned by 300 of the Ontario operators.

Lodges are concentrated around Lake Nipissing, the French River, Wawa, Gogamam, Lake of the Woods, Vermilion Bay and Red Lake. The fishing season in Northern Ontario runs from May to mid or late September.

Québec has 505 recreational fishing establishments of which 105 are exclusively fishing and 400 offer combined fishing and hunting. All outfitters, except for those in designated northern areas, are required by provincial law to provide accommodations as a condition of their licence. Most accommodations in the province are camps and chalets. Eighty-five per cent of the outfitters are seasonal operations which for fishing extends for about five months. About 60 per cent of facilities are located in three regions, namely: Outaouais, Abitibi-Temiscaming and Duplessis/Manicouagan. The highest concentration of Zones d'Exploitaton Contrôlée is also found in these regions.

New Brunswick has 105 outfitting operations which offer lodge or camp accommodations. All operators can provide both fishing and hunting opportunities. Facilities are concentrated for the most part along the Miramichi River system and in the Victoria Country.

Nova Scotia has 18 establishments all which offer both fishing and hunting.

In Prince Edward Island, a number of charter boat operations serve a significant saltwater recreational fishery. There are no freshwater fishing outfitters.

Newfoundland and Labrador has 39 fishing lodges. About 25 of these are located in Labrador and are mainly accessible by fly-in services.

3.3 Performance and Business Conditions

3.3.1 Utilization Rates

The vast majority of operations are seasonal and only a relatively small number attract clientele on a year-round basis. Spring and fall are the peak seasons in the more remote lodges and camps closely coinciding with the best fishing and hunting conditions. More accessible facilities located near urban centres attract family vacationers with peak utilization coinciding with the summer holiday season and for whom prime fishing opportunities are not so important.

Table 5 shows available capacity and occupancy rates by jurisdiction. Estimates come from different sources with different degrees of accuracy.

Generally, on a national scale, peak season occupancy for most operations is in excess of 75 per cent of available sleeping capacity and up to 100 per cent for the more renowned facilities. Occupancy rates for the full operating periods are in most cases much lower.

The national picture of occupancy rates conceals regional and local variations. Also, the concept of occupancy excludes many aspects of utilization since it captures only lodging. In many regions, outfitters are experiencing less-than-adequate occupancy on an operating period basis. A recent study of fishing lodges and resorts in British Columbia

TABLE 5: LODGE UTILIZATION CHARACTERISTICS - BY JURISDICTION

	Per cent of operations offering year-round services	Per cent of operations offering seasonal services	Approximate) Capacity (1) (number of beds)	Average Occupancy (3) (% of capacity) Operating period	Peak
Newfoundland	0	100	975	35-40	80
Nova Scotia	0	100	450	40-60	100
Prince Edward Island	-	-	-	-	-
New Brunswick	NA	NA	2,625	15-20	NA
Quebec	15	85	12,625	30-40	80
Ontario	NA	NA	28,000	60-70	90-100
Manitoba(2)	23	77	2,650	50	100
Saskatchewan	13	87	4,500	39	55
Alberta	10	90	250	14	40
British Columbia Freshwater	14	86	5,150	35	62
British Columbia Saltwater	1	99	1,275	62	85
Yukon	0	100	50	NA	75
Northwest Territories	0	100	1,025	NA	70

(1) Estimated by assuming an average of 25 beds per operation.

(2) From the study by D. Tapolniski and L. Anderson "An Economic Survey of Manitoba's Lodge Industry", Department of Fisheries and Oceans, Western Region, 1985.

(3) From personal communications with spokespersons for outfitters associations and from information made available by Tourism Canada.

shows average occupancy rates of 62 per cent during peak months in the freshwater recreational fishery and 85 per cent for the saltwater sector. Earlier studies of occupancy in the prairie provinces and the Northwest Territories point to chronic low occupancy rates with the possible exception of the Manitoba industry. Information made available by Alberta Tourism shows occupancy rates for the peak months of June and September in Alberta's fly-in lodges to be 57 per cent and 15 per cent respectively. However, there are only 10 fishing lodges in Alberta.

According to NOTO, all Ontario lodges are usually full soon after beginning of the fishing season - primarily due to fishing demand although some bear hunting takes place at that time - and again in the fall when the hunting season is in full swing. Tourism Canada reports seasonal occupancy for Ontario lodges of 60 to 70 per cent increasing to close to 100 per cent in the peak holiday period at road accessible facilities and remains steady at more remote operations.

Québec experiences a seasonal occupancy rate of 30 - 40 per cent over an operating period of about five months for about 85 per cent of all operations. Zones d'exploitation controlé (ZEC's) are reported to experience 77 per cent occupancy in peak season.

In the Maritime provinces and Newfoundland, operations are almost all seasonal and seasonal occupancy rates low except for facilities near a few renowned fishing sites.

On a national basis, only about 10 to 15 per cent of operations are open for business year-round. Seasonal occupancy rates in terms of available beds range from 15 to 70 per cent with Ontario showing the strongest performance followed by the British Columbia saltwater sector.

A second tier of jurisdictions show fair seasonal occupancy rates due to sharp up-swings in peak season. The British Columbia freshwater sector, Saskatchewan, Manitoba and Québec place in this second-tier category. The Maritime provinces in general show relatively low occupancy over the operating period. A third category comprising the outfitting industry in the NWT, Yukon and Newfoundland and Labrador experience generally shorter operating seasons but show good peak season performance.

Traditionally, fishing and hunting have been the mainstay of the outfitting industry. In recent years, some outfitters have been making efforts to diversify into alternative recreational activities; particularly non-consumptive activities aimed at attracting an emerging clientele wishing to escape crowded urban environments. Alternative products being offered in conjunction with fishing and hunting include swimming, sailing, canoeing, cross-country skiing, nature hikes, snowmobiling and trail riding.

Efforts to increase utilization by diversification have met with mixed results. There appears to be limits on the potential for diversification depending on accessibility, site features and existing infrastructure. Diversification usually entails increased financial

outlays, more organization and acquiring different expertise. Many operators find these requirements burdensome.

It is apparent that some operators have employed an opposite strategy by specializing and targeting a specific market. A significant number of operators are oriented toward affluent, up-scale clientele willing to pay a premium for exclusive features. One important development for the outfitting industry is the trend to habitat protection and stock conservation on the part of anglers. The growing tendency to release live fish, and to keep only that amount which can be readily consumed, will protect the resource without necessarily diminishing demand for outfitting services.

3.3.2 Financial Performance

No systematic assessment of the financial performance of the recreational fishing service industry is available on a nation-wide basis. A number of systematic surveys of outfitters operating in Western Canada, including the recent study of the fishing lodge industry in British Columbia, together with authoritative opinions and indirect evidence provide a reasonable basis for reaching general conclusions about the financial state and long-term viability of the industry.

As a general characterization, the outfitting industry can be separated into two categories based on size and business aspects. The smaller operators, earning gross incomes of less than $100,000 annually, out-number larger establishments by a ratio of 2 to 1. Many smaller operations are undertaken as family affairs - often as a hobby. Some smaller outfitters are affiliated with operations such as flying services, marinas and motels. In contrast, a number of larger operations, where annual revenue can reach or exceed $1 million, constitute stand-alone ventures.

In a general sense, revenue and profits are related to product and location in as much as these factors largely determine occupancy rates and capacity utilization. Operations located within a reasonable car drive of large urban centres are in a position to exploit efficiencies of scale and, through diversification of products, to achieve longer operating periods and higher utilization of facilities. Some Great Lakes, British Columbia and Québec properties display this feature.

Some unique properties, while not so readily accessible, are able to overcome locational disadvantages by offering superior fishing possibilities and/or outstanding scenery. A few saltwater properties in British Columbia and some internationally renowned lodges in the Northwest Territories, British Columbia, Québec, New Brunswick and Newfoundland and Labrador exemplify this situation.

Maximizing utilization and occupancy and adjusting operations to seasonality is pivotal. An average seasonal occupancy rate of 50 per cent of capacity over an operating period of at least four months is the minimum requirement for adequate replacement of capital and long-term viability. On a nation-wide basis capital facilities are aging. The

majority of facilities are over twenty years old. Relatively few new operations have started in recent years with most investment going into replacement as distinct from additions to capacity.

The British Columbia saltwater lodges and the Ontario outfitters in general display the strongest economic performance. Although the Northern Ontario outfitting industry has declined by perhaps 20 per cent since 1978, current demand is strong and occupancy rates are firm at a relatively high level. Moreover, investment is as much as $30 million per year (or about $25,000 per establishment) mainly for upgrading existing facilities.

The corresponding capital expenditure for the British Colombia freshwater fishing lodge industry is estimated to be about $49,000 per operation. This indicates that either the Ontario capital stock is younger on average or the rate of expansion is lower in Ontario. The Ontario Ministry of Natural Resources restricts new outfitting development in the Northern parts of the province and this underlies some of the apparent difference in capital investment rates.

Many owners in the freshwater component of the lodge industry in British Columbia have serious cash flow problems. It is unclear whether the smaller operators as a group are financially able to generate sufficient earnings to replace aging capital stock. Operations in Ontario are generally financially sound and annual revenues from outfitters (fishing and hunting) average about $250,000 per operation.

According to Tourism Canada, the Québec outfitting industry is currently experiencing lower than normal utilization. The Zones d'Exploitation Contrôlée (ZEC) have overcome initial problems and are believed to be in fair financial shape.

The Maritime Provinces, particularly New Brunswick, exhibit an unregulated outfitting environment, a lack of standardization of facilities and chronic low seasonal utilization rates.

Government assistance programs are emerging as a major factor in enhancing and in some cases sustaining the outfitting industry. In Ontario, the Capital Construction Assistance Program provides limited interest-free loans for up to 50 per cent of renovation or expansion costs as well as for new ventures. Short-term assistance in the form of loans is available for firms with cash flow problems under the Working Capital Assistance Program. In addition, several employment subsidy programs are available for part-time labour which, in some areas, pay up to 100 per cent of the cost.

The Federal Government sponsors a number of programs which subsidize employment. Federal/Provincial Development Sub-agreements are limited to large projects over $1 million. Nevertheless, Tourism Canada reports that about 25 new projects have been approved in recent years under the

tourism sub-agreements, mainly in Newfoundland, New Brunswick, Manitoba, Saskatchewan and British Columbia. In Atlantic Canada, a number of fishing lodge operators have received financial assistance from the Atlantic Canada Opportunities Agency (ACOA).

3.3.3 Institutional Aspects

Regulations governing the facilities and services of fishing outfitters are in the jurisdiction of provincial and territorial governments. Generally, outfitting establishments are required to be licenced. Apparently, in many cases licensing merely means conforming to laws dealing with health, fire, building and sanitary requirements. In some jurisdictions, outpost camps and trailer parks can operate without a licence.

Recognition of the need for standards has undoubtedly led to the establishment of outfitter associations in most regions of Canada. These associations are becoming more active in pressing for specific laws and regulations to foster development of recreational fishing and the outfitting industry.

Ontario outfitters are lobbying provincial authorities to license based on facility grading and classification. The Northwest Territories has issued guidelines on capacity limits for fishing lodges aimed at protecting the quality of the fishing experience. Ontario, Manitoba and Saskatchewan also employ allocation methods to limit the capacity of lodges in accordance with resource management policies. The Manitoba licence system involves all relevant departments of the provincial government through a licensing committee.

The need for standards is of paramount importance to industry. Tourism Canada estimates that only about 40 percent of all outfitting establishments in Canada meet international standards.

4. THE RECREATIONAL FISHING ECONOMY

4.1 Economic Features

The service economy supporting the recreational fishery can be divided between "specialized" businesses and "general" businesses.

Exhibit 2 summarizes the salient features of both "specialized" and "general" branches of the recreational fishing economy. Two features are especially noteworthy. "Specialized" businesses, or outfitters, provide an important source of seasonal income in many regions. Outfitting operations are commonly located in regions of Canada which display high unemployment and lack alternative job opportunities. Hence, the economic role of outfitter is crucial from a regional perspective. Moreover, the type of skills and experience required by outfitters are usually available. In many parts of Canada outfitting offers not only an important source income but also employment in a familiar environment.

The "general" service branch, in contrast to much of the "specialized" branch is comprised of businesses which locate in economically stable regions. Many "general" services firms are large businesses with nation-wide branches. Others are small independent firms. All, however, cater to a broad clientele with sales to anglers representing a relatively small percentage of total business. Taken together this volume of "general" services business, attributable to recreational fishing, is substantial.

The value of sales made solely for the purpose of recreational fishing approached $2.5 billion in 1985. This volume of business represents annually recurring purchases and therefore excludes periodic investments in big-ticket equipment such as boats, motors and real property. About 85 per cent of this business went to the "general" branch firms while the "specialized" services, or outfitters, captured about 15 per cent in 1985.

4.2 Level and Distribution of Sales

The Survey of Sport Fishing in Canada provides data on the level and distribution of purchases on recreational fishing in 1985. These estimates are helpful in determining relative shares. Table 6 shows estimates of purchases made by anglers (resident, non-resident Canadian and foreign) broken down into 13 categories of goods and services. Tables 7, 8 and 9 show the purchasing patterns for each category of angler on a province/territory basis. Table 10 gives the purchase pattern of all anglers by province/territory. Table 11 presents the data compiled in Table 10 expressed in percentages of total purchases in each province/territory.

TABLE 6: 1985 ANGLING-SPECIFIC PURCHASES - BY CATEGORY

	Packages	Accommodations	Camping Fees	Groceries	Rest. Meals	Alcohol	Transport	Boat Rentals	Boat Oper.	Fishing Supplies	Guide Costs	Lic. & Access Fees	Other Direct	TOTAL PURCHASES
						($000,000)								
Resident Anglers	107.5	96.8	63.5	366.8	81.8	120.1	491.9	34.2	219.3	317.8	2.9	39.7	12.9	1,955.2
Non-Resident Canadians	16.3	7.9	2.1	12.4	6.6	5.6	17.6	2.2	3.7	6.1	0.8	2.6	0.6	84.5
Foreign Anglers	143.7	59.2	131.1	47.2	25.6	15.5	16.3	54.3	15.5	17.6	19.6	22.3	2.7	446.2
CATEGORY TOTALS	267.5	163.9	78.7	426.4	114.0	142.0	563.8	51.9	240.6	343.5	12.8	64.6	16.2	2,485.9

SOURCE: Department of Fisheries & Oceans, detailed print-outs of 1985 Survey of Sport Fishing in Canada

EXHIBIT 2: THE RECREATIONAL FISHING ECONOMY

	SPECIALIZED BRANCH	GENERAL BRANCH
PRODUCTS/SERVICES	. Access to scenic fishing resorts . On-site accommodations . Range of amenities . Fishing boat charters . Commercial fish ponds . Fishing tackle & bait . Fishing licences . Guide services . Incidental goods & services . Alternative recreational activities	. Incidental goods & services e.g. boats & motors, camping equipment, clothing, motels, restaurants, marinas, land & cottages, vehicles sales & rentals, fuel, food & insurance . Fishing tackle and licences
SUPPLIERS	. Specialized suppliers(outfitters) e.g. lodges and resorts, charter boat operators, fish pond operators and independent tackle stores.	. General suppliers of multi-purpose goods & services . General suppliers of fishing tackle
SOURCES	. Canadian: - mainly labour & expertise . Imported: - almost all fishing tackle	. Canadian: - wide variety of equipment & services . Imported: - mainly more specialized items
ECONOMIC IMPACT	. seasonal jobs and income in areas of chronic unemployment . Canadian content low for fishing tackle & some specialty items	. Broadly distributed impact . Canadian content high for motels, restaurants, marinas, land & cottages, boats, groceries, fuel & insurance

The estimates tabulated in Tables 7, 8, 9, 10 and 11 are for angling-specific, annually-recurring purchases and do not include purchase of big-ticket purchase such as boats and cottages. The term "angling-specific" means purchases of goods services made solely for the purpose of recreational fishing activity.

4.3 Specialized Services

"Specialized" services comprise those businesses commonly considered as the outfitting industry, namely: fishing lodges properties, charter boat operations and independent tackle shops.

It is possible from Tables 7, 8, 9, 10 and 11 to make a rough estimate roughly the level of 1985 business going to the "specialized" services. The total of four purchase categories ("Packages" "Camping Fees", Boat Rentals" and "Guide Costs") approximates the level of outfitting business. The estimate understates the actual total because the business conducted at independent tackle stores (considered a part of the "specialized" or outfitting industry) cannot be separated from total purchases in the "Fishing Supplies"category. Furthermore, purchases such as alcohol and fishing supplies made at fishing lodges are not included in the "Packages" category. These four purchase categories, added together, nonetheless give a reasonable order-of-magnitude estimate of the size and distribution of outfitting services for recreational fishing. Outfitting for recreational fishing in Canada reached revenues in excess of $400 million in 1985.

The outfitting business represents 15 per cent of annual purchases made solely for recreational fishing in 1985. "Packages" sold by fishing lodges amounted to an estimated $267.5 million in 1985. This amount was about 65 percent of all business conducted by outfitters for fishing purposes. It is evident that the outfitting services industry is heavily dependent upon foreign visitors and Canadians visiting from other provinces/territories. Over 50 per cent of package sales were made to foreign visitors - mainly from the United States.

TABLE 7: 1985 ANGLING-SPECIFIC PURCHASES - RESIDENT ANGLERS

	Packages	Accommodations	Camping Fees	Groceries	Rest. Meals	Alcohol	Transport	Boat Rentals	Boat Oper.	Fishing Supplies	Guide Costs	Lic. & Access Fees	Other Direct	TOTAL
							($000,000)							
Nfls	0.82	0.54	0.84	10.21	0.98	3.68	10.66	0.17	2.05	5.52	0.04	0.36	0.13	36.00
P.E.I.	x	x	x	0.18	0.09	0.09	0.82	x	0.07	0.53	x	0.06	x	1.90
Nova Scotia	0.16	0.07	0.40	3.42	0.06	1.13	5.90	0.02	0.73	3.32	x	0.46	0.04	16.26
N.B.	0.50	0.29	0.72	5.12	0.74	2.03	7.32	0.12	0.92	3.99	0.05	0.33	0.07	22.20
Québec	59.64	33.95	11.88	107.33	23.86	23.87	117.21	8.13	33.95	80.82	N/A	30.10	4.6	535.39
Ontario	29.45	47.45	32.18	141.78	37.00	57.64	194.15	18.34	75.28	137.47	1.64	N/A	5.10	777.50
Manitoba	2.05	1.87	2.64	12.16	2.24	4.46	18.14	0.80	4.46	8.77	0.06	0.88	0.67	59.22
Sask	3.51	2.44	2.09	9.60	1.95	3.18	16.57	1.28	4.08	10.45	0.17	1.37	0.41	57.12
Alberta	3.79	2.86	4.54	32.16	5.34	8.56	51.82	1.29	5.64	21.65	0.13	1.65	0.82	140.30
B.C. Freshwater	1.27	3.62	4.06	26.95	4.54	8.01	42.13	1.60	9.02	19.20	0.16	3.25	0.32	124.15
B.C. Saltwater	5.91	3.72	3.99	17.20	4.91	6.97	24.56	2.36	82.52	24.93	0.65	1.18	0.73	179.66
Yukon	x	0.02	0.11	0.65	0.09	0.22	1.02	x	0.25	0.56	x	0.03	x	2.90
N.W.T.	0.36	0.02	0.02	0.07	0.03	0.23	1.68	0.09	0.32	0.64	x	0.04	x	4.21
Canada	107.46	96.85	63.47	366.77	81.83	120.07	491.98	34.20	219.30	317.84	2.90	39.71	12.89	1,956.81

NOTE: X means the amount is less than $0.02 million.

SOURCE: Department of Fisheries and Oceans, detailed print-outs of 1985 Survey of Sport Fishing in Canada.

TABLE 8: 1985 ANGLING-SPECIFIC PURCHASES - NON-RESIDENT CANADIANS

	Pack-ages	Accom-moda-tions	Camping Fees	Grocer-ies	Rest. Meals	Alco-hol	Trans-port	Boat Rentals	Boat Oper.	Fishing Supplies	Guide Costs	Lic. & Access Fees	Other Direct	TOTAL
							($000,000)							
Nfld	0.42	0.13	0.02	0.14	0.09	0.09	0.27	x	x	0.06	0.05	0.05	x	1.36
P.E.I.	x	0.05	x	0.06	0.04	0.02	0.06	x	x	0.08	x	x	x	0.29
Nova Scotia	0.02	0.04	x	0.05	0.05	0.03	0.08	x	x	0.03	x	0.03	x	0.34
N.B.	0.40	0.11	x	0.13	0.08	0.06	0.14	x	x	0.07	0.07	0.07	x	1.20
Québec	4.20	2.22	0.27	3.70	1.09	1.60	3.40	0.30	1.32	1.61	N/A	1.34	0.35	21.30
Ontario	0.57	0.87	0.36	2.80	0.96	1.06	2.71	0.65	1.00	1.16	0.02	0.21	0.05	12.48
Manitoba	0.04	1.22	0.06	0.63	0.22	0.27	0.08	0.03	0.19	0.33	x	0.02	x	2.93
Sask	1.13	0.60	0.32	1.10	0.47	0.43	1.86	0.20	0.25	0.54	x	0.24	0.07	7.23
Alberta	0.03	0.15	0.06	0.34	0.21	0.12	0.46	0.02	0.04	0.18	x	0.03	x	1.67
B.C. Freshwater	0.67	1.11	0.68	2.30	1.42	0.94	3.45	0.27	0.46	1.24	0.14	0.46	0.08	13.26
B.C. Saltwater	6.67	1.27	0.26	0.81	1.77	0.82	3.86	0.58	0.45	0.58	0.56	0.13	0.04	17.75
Yukon	x	0.05	0.05	0.24	0.13	0.10	0.50	x	x	0.06	x	x	x	1.18
N.W.T.	2.15	0.15	x	0.13	0.09	0.08	0.72	0.11	x	0.15	0.02	0.02	x	3.64
Canada	16.30	7.97	2.08	12.43	6.62	5.62	17.59	2.16	3.71	6.09	0.86	2.6	0.59	84.63

NOTE: X denotes amounts less than $0.02 million.

SOURCE: Department of Fisheries and Oceans, detailed print-outs of 1985 Survey of Sport Fishing in Canada.

TABLE 9: 1985 ANGLING-SPECIFIC PURCHASES - FOREIGN ANGLERS

	Packages	Accommodations	Camping Fees	Groceries	Rest. Meals	Alcohol	Transport	Boat Rentals	Boat Oper.	Fishing Supplies	Guide Costs	Lic. & Access Fees	Other Direct	TOTAL
							($000,000)							
Nfld	1.46	0.11	x	0.07	0.07	0.03	0.02	x	x	0.03	0.05	0.04	x	2.11
P.E.I.		0.03	x	x	0.02	0.03	x	0.02	x	x	0.07	0.05	x	0.14
Nova Scotia	0.07	0.12	0.02	0.07	0.10	0.02	0.11	x	x	0.03	0.02	0.03	x	0.62
N.B.	1.21	0.05	0.07	0.37	0.20	0.14	0.32	0.03	0.02	0.18	0.54	0.03	x	3.80
Québec	11.20	4.50	0.50	0.30	1.45	1.10	0.40	0.80	0.96	1.07	N/A	1.30	0.64	30.60
Ontario	77.32	41.25	8.80	33.62	15.50	11.85	29.07	11.00	10.17	13.30	4.74	17.45	1.63	275.3
Manitoba	14.32	2.40	0.65	2.05	1.21	0.65	3.56	0.57	0.68	0.96	0.37	1.31	0.70	29.3
Sask	6.98	0.99	0.32	1.17	0.63	0.35	1.90	0.30	0.45	0.45	0.18	0.38	0.08	14.13
Alberta	1.11	0.63	0.07	0.26	0.38	0.82	0.46	0.03	x	0.24	0.65	0.08	x	4.03
B.C. Freshwater	4.40	0.25	0.87	2.30	1.70	0.65	4.43	0.40	0.24	0.87	0.18	0.60	0.15	19.20
B.C. Saltwater	18.62	5.88	1.72	3.88	4.07	1.26	8.88	2.23	5.05	2.20	2.22	0.72	0.19	56.84
Yukon	0.58	0.15	0.71	0.25	0.15	0.70	0.44	0.03	x	0.08	0.03	0.06	0.03	1.95
N.W.T.	6.40	0.22	0.05	0.08	0.11	0.07	0.87	0.04	x	0.16	0.12	0.05	0.03	8.20
Canada	143.72	56.5	13.11	47.17	25.60	16.30	54.31	15.45	17.63	19.60	9.13	22.30	2.76	445.80

NOTE: X denotes amounts less than $0.02 million.

SOURCE: Department of Fisheries and Oceans, detailed print-outs of 1985 Survey of Sport Fishing in Canada.

TABLE 10: 1985 ANGLING-SPECIFIC PURCHASES - ALL ANGLERS, BY JURISDICTION

	Packages	Accommodations	Camping Fees	Groceries	Rest. Meals	Alcohol	Transport	Boat Rentals	Boat Oper.	Fishing Supplies	Guide Costs	Lic. & Access Fees	Other Direct	TOTAL
						($000,000)								
Nfld	2.7	0.7	0.9	10.4	1.1	3.8	10.9	x	x	5.6	0.1	0.5	x	39.5
P.E.I.	x	x	x	0.2	0.2	x	0.9	x	x	0.5	x	x	x	2.3
Nova Scotia	0.3	0.2	0.5	3.5	0.2	1.2	6.1	x	x	3.4	x	0.6	x	17.2
N.B.	2.1	0.4	0.8	5.6	1.0	2.2	7.7	0.3	1.0	4.3	0.6	0.4	x	27.2
Québec	75.0	40.6	12.6	111.3	26.4	26.6	121.0	9.2	36.2	83.5	N/A	32.7	5.5	580.3
Ontario	107.3	89.6	41.3	178.2	53.5	70.5	225.9	29.9	86.5	152.0	4.6	19.3	6.7	1,065.0
Manitoba	16.4	5.5	3.3	14.8	3.7	5.4	21.8	1.4	5.4	10.1	0.5	2.2	1.4	95.7
Sask	11.6	4.0	2.7	11.9	3.1	3.9	20.4	1.8	4.8	11.4	0.4	2.0	0.5	78.4
Alberta	4.9	3.6	4.7	32.8	5.9	9.5	52.8	1.5	5.7	22.0	0.7	0.5	1.0	145.6
B.C. Freshwater	6.3	5.0	5.6	31.5	7.7	9.6	50.0	2.3	9.7	21.3	2.3	4.3	0.5	156.1
B.C. Saltwater	31.2	10.9	6.0	21.9	10.7	8.0	37.3	5.2	88.0	27.8	3.4	2.7	0.9	253.9
Yukon	x	0.2	0.9	1.1	0.4	1.0	1.9	0.1	x	0.7	x	0.1	x	6.0
N.W.T.	8.9	0.4	0.1	0.3	0.2	0.4	3.3	0.2	0.5	0.9	0.2	0.1	x	16.0
Canada	267.5	161.1	79.4	426.5	114.1	142.2	563.8	51.8	237.8	343.5	12.8	65.5	16.5	2,483.0

NOTE: X denotes amounts less than $0.02 million.

SOURCE: Department of Fisheries and Oceans, detailed print-outs of 1985 Survey of Sport Fishing in Canada.

TABLE 11: PURCHASE CATEGORIES AS PERCENTAGES OF ALL PURCHASES MADE SOLELY FOR ANGLING
(1985 Purchases - All Anglers, by Jurisdiction

	Packages	Accommodations	Camping Fees	Groceries	Rest. Meals	Alcohol	Transport	Boat Rentals	Boat Oper.	Fishing Supplies	Guide Costs	Lic. & Access Fees	Other Direct
	Per Cent												
Nfld	6.8	1.8	2.2	26.3	2.8	9.6	27.6	-	-	14.2	-	1.3	-
P.E.I.	-	-	-	8.7	8.7	-	39.1	-	-	21.7	-	-	-
Nova Scotia	1.7	1.2	2.9	20.3	1.2	6.9	35.5	-	-	19.7	-	3.5	-
N.B.	7.7	1.5	2.9	20.6	3.7	8.1	28.3	1.1	3.7	15.8	2.2	1.5	-
Québec	12.9	7.0	2.2	19.2	4.5	4.5	20.8	1.6	6.2	14.4	NA	5.6	0.9
Ontario	9.7	8.1	3.7	16.1	4.8	6.3	20.3	2.7	7.8	13.7	0.4	1.7	0.6
Manitoba	17.1	5.7	3.4	15.5	3.8	5.6	22.8	1.5	5.8	10.5	0.5	2.3	1.5
Sask	14.8	0.5	3.4	15.2	3.9	5.0	26.0	2.3	6.1	14.5	0.5	2.5	0.6
Alberta	3.4	2.5	3.2	22.5	4.0	6.5	36.3	1.0	3.9	15.1	0.5	0.3	0.7
B.C.													
Freshwater B.C.	4.0	3.2	3.6	20.2	4.9	6.1	32.0	1.5	6.2	13.6	1.5	2.7	0.3
Saltwater	12.3	4.3	2.4	8.6	4.2	3.1	14.7	2.0	34.6	10.9	1.3	1.1	0.3
Yukon	-	3.3	15.0	18.3	6.6	16.6	31.6	1.6	-	11.6	-	1.6	-
N.W.T.	55.6	2.5	0.6	1.8	1.2	2.5	20.6	1.2	3.1	5.6	1.2	0.6	-
Canada	10.6	6.4	3.1	16.9	4.5	5.6	22.3	2.0	9.5	13.6	2.2	2.6	0.6

SOURCE: Department of Fisheries and Oceans, detailed print-out of 1985 Survey of Sport Fishing in Canada.

4.4 General Services

Approximately 85 per cent of the business conducted solely in support of recreational fishing in Canada comprised goods and services provided by the large "general" service category. This group includes motels, airlines and small flying services, restaurants, sports stores, department and hardware stores and grocery outlets among others. These purchases, conducted solely for the purpose of fishing, amounted to about $2 billion in 1985. Transportation, groceries, fishing supplies and boat operating supplies figure highly in this angling-related business conducted by the "general" service industries. Clearly, independent anglers who organize fishing outings for themselves constitute important clientele for the "general" service category even though recreational fishing business is small relative to the total business conducted by the wide array of establishments which provide such goods and services for all purposes.

In addition to on-going purchases associated exclusively with recreational fishing demands, there were purchases of real property and big-ticket items such as boats and motors which amounted to almost $2 billion in 1985 according to the Sport Fishing Survey estimates. These purchases can be considered as annual additions to the capital assets of the fishery.

5. CONCLUSIONS

Fishing effort, measured by the number of days in which some fishing is undertaken, was stable over the three surveys of Sport Fishing in Canada conducted in 1975, 1980 and 1985. For these surveys, the retained catch showed no decline in the recreational fisheries when all species are considered. However, anglers appear to be spending more for each fish caught and retained, after allowing for inflation: real expenses were higher by 18 per cent in 1985 over 1975. The growing practice of "catch and release" may contribute to the increased expenditure per fish. There is also the possibility that some anglers may spend more lavishly than in previous years.

There are about 2400 recreational fishing outfitting operators in Canada. About 2000 of these offer hunting as well as fishing. In terms of number of operations, about 50 per cent of the Canadian outfitting industry is located in Ontario, about 20 per cent in Québec and about 10 per cent in British Columbia.

Angling activity generated an estimated $4.4 billion in sales in 1985. Of this amount, about $2.5 billion can be expected to recur annually. The remainder was spent on big-ticket items such as boats and real estate. About 85 per cent of the annually recurring business is captured by "general" suppliers whose clientele is not limited to anglers. About 15 per cent (estimated at approximately $400 million in 1985) is going to the specialized branch of the recreational fishing service economy - essentially the outfitting industry.

The outfitting industry accounted for about $400 million in sales in 1985 or about 15 per cent of all purchases made solely for recreational fishing. Fishing packages, put together by outfitters, amounted to nearly $270 million or about 65 per cent of all outfitting revenue. About 50 per cent of package sales were made to foreign anglers - mainly American. Statistics Canada reports the average revenue of outfitters (including hunting revenue) at about $97,000 in 1984. Small operators (annual revenues less than $100,000) outnumber large by two to one.

The large "general" branch of the recreational fishing economy which includes motels, airlines and flying services, restaurants, marinas, sports stores, department and hardware stores and grocery outlets supplied goods and services valued at about $2 billion or about 85 per cent of all purchases made solely for recreational fishing in 1985.

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